

NB Orbis Tutorial

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Introduction and Overview

Orbis Overview

Orbis is a free-form retrieval system accessible within Nota Bene. It gives you instant access to thousands of pages of existing text—research notes, lectures, random jottings, lab reports, interview transcripts, field notes, lists, paragraphs from previous papers and chapters of books. Orbis makes everything you've ever written in Nota Bene or imported from an outside source accessible. Multiple documents can be searched simultaneously with the results displayed for easy reference or retrieved for use in a current document.

Orbis is the ideal tool for managing a career's worth of notes, papers and general information. There are no practical limits to the amount of information that can be handled: up to 8,000 files in each of 1,000 folders can be searched simultaneously (a total limit of 8 million files!). Use Orbis to find old notes, to make new connections and to come up with new ideas. Your old notes and papers can become a valuable and easily searchable source of information for your continuing writing and research.

A General Introduction to Textual Databases

Orbis databases are textbases, which are quite distinct from traditional structured databases.

Structured databases require that information entered into a database be stored in defined fields, each of which holds a specific type of information. Bibliographic databases (such as *Ibidem*) store author names, years of publication, publisher names, titles, and so on, with field tags to identify the type of information, so that it can be retrieved, sorted, and printed in certain ways. Textbases, by contrast, deal with the sort of unstructured information that one finds in academic papers, lecture notes, reading notes, correspondence and other textual files.

To use Orbis, you must have files in Nota Bene format or in TXT format. New users may want to convert some of their files from other word processing formats to Nota Bene so that they can be searched by Orbis. Other than making sure that the files to be searched are Nota Bene or TXT files, you do not need to do anything to prepare your files for use with Orbis. There is no data entry with Orbis, and no special formatting required.

It is helpful to know where the files that you want to search are located on your computer. By default, Nota Bene files are stored in your Nbwin\Document folder, but you can choose to save your files in any folder on your computer. Most people set up different folders for different kinds of files (e.g., a research folder, a correspondence folder, etc.), and we recommend that you have a specific plan for where you would like to save your Nota Bene files. For example, you might want to create a general "NBFiles" folder on your hard drive, and then create various subfolders (e.g., research, correspondence, etc.) for different kinds of documents. Orbis can search any files anywhere on your computer, but you'll need to know where the files are so that you can tell Orbis which folders to search.

Entries

Orbis handles text in units called "entries." An entry is a unit of text that is separated by a defined break, such as a hard return or a hard page break. The most commonly used type of entry is a paragraph -- a unit of text separated by hard returns. Paragraphs are recommended for most purposes, but advanced users may find that a different type of entry, such as sentences, pages (separated by hard page breaks) or whole files, is more suitable for some textbases. You can also add special markers to your files to manually define the beginning and end of each entry. For more information about entries, see Entries.

Keywords

Once you've defined an entry, Orbis retrieves text based on the "keywords" that entry contains. You do not need to worry about inserting keywords in your documents, because Orbis will treat all words as keywords (except for words on a user-modifiable omit list). There is no need for you to decide in advance which words will be searchable. You will be able to search for any word that was used in any file that is in your textbase (except words on the omit list) and Orbis will retrieve all entries that contain the target word (or words).

The needs of most users are full met with no effort to define keywords, but advanced features are available to provide experienced users with additional control. For example, special non-printing keywords can be added to your documents, and synonym lists can automatically expand your search to include synonyms.

Defining a Textbase: Traditional Orbis or Instant Orbis

Before using Orbis to search your files, a textbase must be created. A textbase is a defined set of files to be searched. There are two ways to create a textbase: the traditional method and the new "Instant Orbis" method.

- ü Traditional Orbis places the focus on Orbis. The Textbase Creation dialog (**File, New Textbase** from the Orbis screen) is used to create a textbase. Creating a textbase involves giving it a name (e.g., "Research") and giving instructions that are something like the following: "Whenever I search my Research textbase, I want Orbis to search all of the files that have the extension .nb and are in my C:\NBFiles\Research folder, and I want to see every paragraph that matches the search criteria." This option is the most flexible, customizable, and powerful way to build and manage Orbis textbases.
- ü Instant Orbis treats Orbis as a property or attribute of the current file. Rather than beginning with Orbis as a separate process, you begin with the current file and specify which textbase it should be part of. All you need to do is open a file and click **File, Orbis Instant Search**. You will then be prompted to include the open file in a textbase, and you can specify that other files in the same folder with the same extension should also be added to the same textbase.

Instant Orbis was designed to make Orbis easily accessible from the word processor and to encourage more people to use this powerful search engine. The traditional method is still recommended for experienced users and for new users who are willing to spend a modest amount of time learning about Orbis (especially those who are accustomed to setting up folders in Windows and saving different kinds of files in different folders).

Searching a Textbase

Once a textbase is created (either by going to Orbis and creating a textbase or by using the new Instant Orbis), it can be searched. When you search a textbase, you simultaneously search all of the files that are defined as being part of the textbase. You can search for one word, or you can construct elaborate search strings. Orbis will find every paragraph (or other defined entry type) that matches your search terms and present the results in a convenient table format. Click on one of the results in the table, and you will see the full paragraph in an adjacent window. The full paragraph can be expanded to see the context (paragraph(s) before and/or after the retrieved text in the original document), and retrieved text can be inserted in an open file. All of this is done without even opening the source file. Of course, if you want to open the source file, you can do so. Orbis can search many thousands of files and provide the results almost instantaneously. By the time you have typed in the term you are searching for, you will have the results!

To introduce you to the basic features of Orbis, we have prepared a short tutorial. We recommend that you go through this tutorial to make the basics clear before you begin building your own textbases.

Orbis Tutorial

Orbis Tutorial 1: Introduction

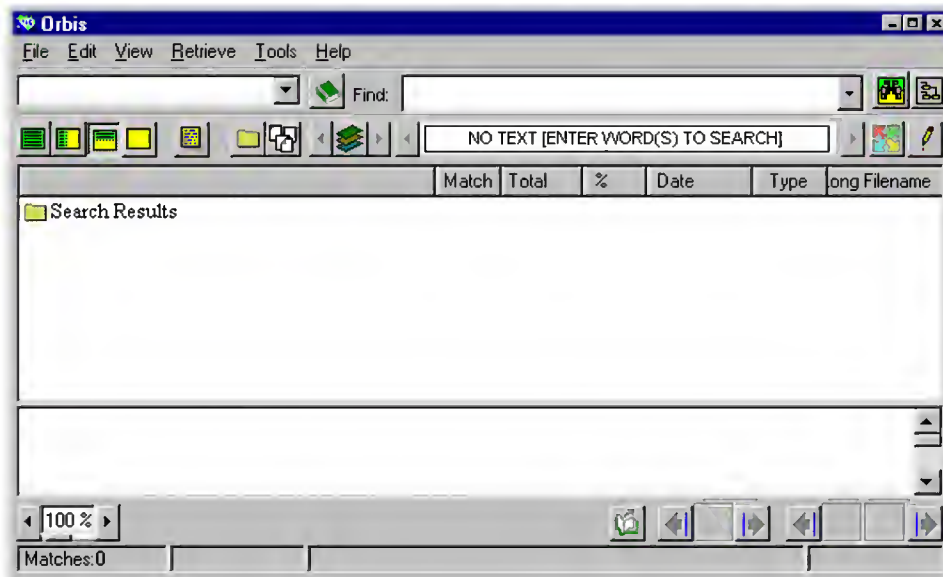
It is easiest to follow this tutorial if you have a printed version to look at while you go through the suggested exercises. A printable version of this tutorial in PDF format is provided with Nota Bene, and a PDF version of the full Orbis Help, including this tutorial, can be downloaded. Assuming that you have Nota Bene (Lingua Workstation, Scholar's Workstation or the trial version) and the free Adobe Acrobat Reader installed on your computer, you can use Windows Explorer or My Computer to browse to your Nbwin\Document\Help folder and open ORBIS.PDF. This file can also be opened by opening Orbis (**F4** or **Tools, Orbis**) and clicking **Help, Tutorial (PDF Format)**. The PDF version of the full Orbis Help (including this tutorial) can be downloaded from www.notabene.com/NBHelp.html. Clicking **Help, Printable Manual** on the Orbis screen will give you an option to go directly to this page to download.

Orbis is used to search your Nota Bene files (and/or your .txt files), and find the information you are looking for instantly. Before searching, you must define a set of files to be searched. This is called creating a textbase, and it can be done in either of two ways:

- ü Open a Nota Bene file and click **File, Orbis Instant Search**. This will open the Orbis Instant Search dialog which can be used to make the currently open file searchable as part of a textbase. For more information on this method, see Instant Orbis.
- ü Open Orbis and click **File, New Textbase**. This will open the Textbase Creation dialog which can be used to create a textbase (i.e., to name the textbase and to define a group of files to be searched), This is the traditional method of defining a textbase, and it is more powerful and flexible.

This tutorial will focus on the traditional method of creating an Orbis textbase. You will learn how to create a textbase and you will use it to search multiple files simultaneously. In this tutorial, we will use files that are provided with the program. But when you use Orbis for your own work, you will need to have your own Nota Bene files, and you will need to know where the files are saved on your computer. Most people have a system for saving their word processing files in different folders depending on the topic, and having a system like this (different folders for different kinds of files) will make it easier for you to create textbases that will be useful for your work. Your folders and files can be anywhere on your computer -- in folders on your hard drive, in your Nbwin\Documents folder, in your My Documents folder, or anywhere else. You just need to know where they are. For more information on managing your files, see File Operations Overview in NB Help.

To access **Orbis**, click **Tools, Orbis** on the Nota Bene Main menu, or press **F4**, or click the Orbis button. The Orbis screen will display.



When Orbis is open, a program button will appear on the Windows task bar. You can move back and forth between Nota Bene (the word processor) and Orbis in any of the following ways:

- ü Click the program buttons for Nota Bene and/or for Orbis that appear on the Windows taskbar.
- ü Press **F4** or click the Orbis button to move from Nota Bene to Orbis. Press **F9** to move from Orbis to Nota Bene.
- ü Press **Alt+F6** to toggle between Orbis and Nota Bene.

Take a moment now to browse through the Menu Commands and button descriptors on the Orbis screen.

Orbis Tutorial 2: Files for Textbase Indexing

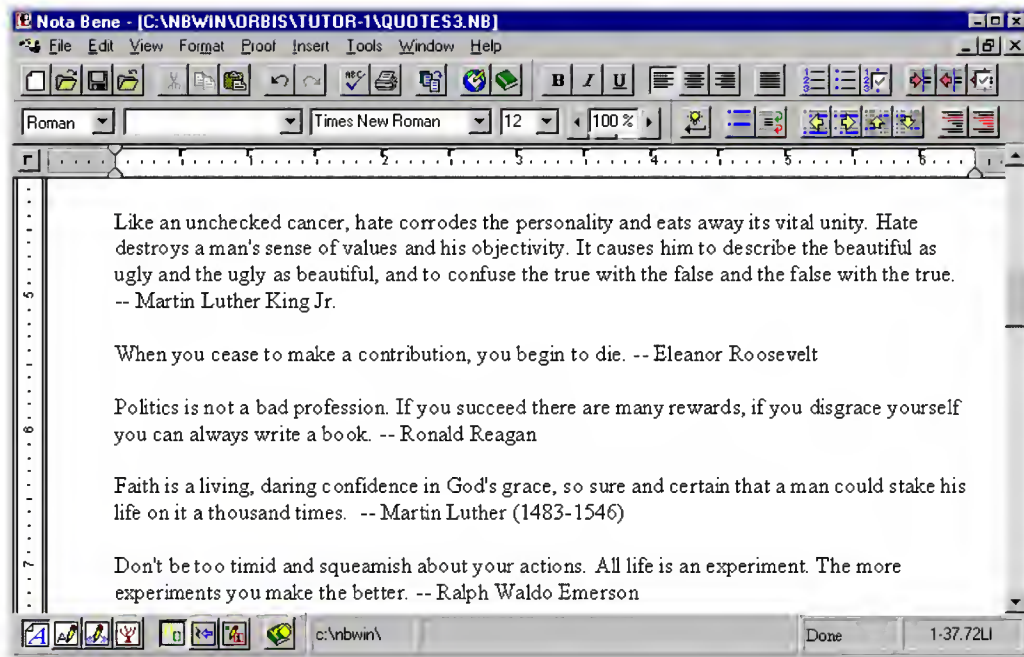
Orbis is a powerful textbase that will allow you to easily search and retrieve text from Nota Bene files or from TXT files. Files in other formats can only be searched if they are first converted to Nota Bene format (or TXT format) or copied and pasted into a Nota Bene file. An Orbis textbase is distinct from a database in that it does not require that the text be "structured" or organized by fields. You do not enter data in Orbis. You merely give Orbis instructions for how to search the data that is contained in regular Nota Bene files. The Nota Bene files can be in any folder or folders on your computer. Your files can be saved in folders or subfolders that you set up on your hard drive, in the Windows "My Documents" folder, or in the \Nbwin\Documents folder (the latter is the default folder for documents saved in Nota Bene if no other folder is specified). No special formatting, data entry, or file structure is required.

In setting up an Orbis textbase, you will give the program the following information:

- Ü Name of the textbase. You may want to have several textbases for different purposes--one to search your research notes, one to search personal correspondence, etc. Each textbase will have a name.
- Ü Files to be searched. The files to be searched can be identified by selecting individual files or by selecting folders and file types (e.g., all of the *.nb files in the C:\Nbwin\document folder).
- Ü Entry type. An entry is the unit of text that will be retrieved when the textbase is searched. The paragraph is the most commonly used entry type, and should be used unless you have specific reasons for using another entry type. The program recognizes entries according to what separates one entry from the next. For example, paragraphs are separated by either single or double hard returns.

In the next exercise, we are going to create a textbase named "Quotes." It will search all files in the C:\Nbwin\Orbis\Tutor-1 folder that are of the following file types: *.nb or *.txt (in other words, files with the extensions .nb or .txt). The entry type used will be paragraphs.

There are three files in your C:\Nbwin\Orbis\Tutor-1 folder (if your hard drive has a letter other than C, please substitute that letter in these exercises). Each of these three files is a Nota Bene file with the extension .nb. The files are collections of quotes and sayings collected from Internet sites and from e-mail messages, and are saved as Quotes.nb, Quotes2.nb, and Quotes3.nb. Try opening one or more of these files to see the files that we will use in this exercise. See the example on the next page.

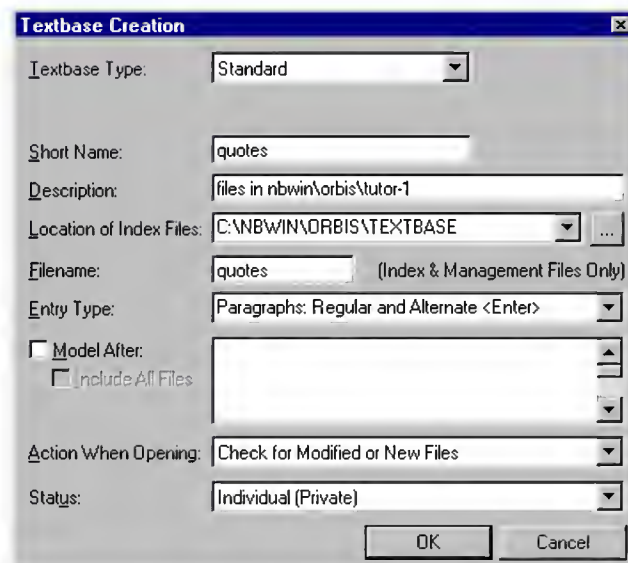


In the next exercise, we will create an Orbis textbase that will be used to search these files.

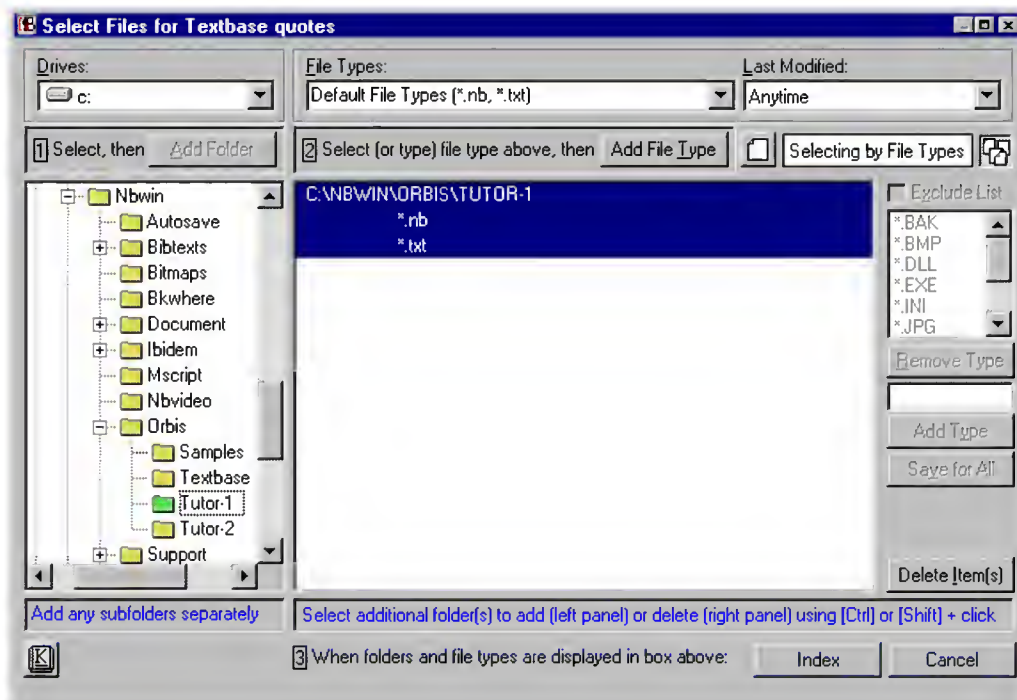
Orbis Tutorial 3: Creating a Textbase

Let's create the textbase now.

- 1 Click **File, New Textbase**. The Textbase Creation dialog will display.
- 2 Use the drop down list to select **Standard** in the Textbase Type box.
- 3 Type in "quotes" in the Short Name field as shown below. The Description and Filename will be filled in automatically, but either can be changed. In this case, we have changed the description to provide a convenient reminder of which files are included in the textbase. Change the description field by deleting "quotes" and typing in "files in nbwin\orbis\tutor-1" as shown below. The other settings do not need to be changed and should be as shown below (the Location of Index Files may be slightly different on your computer). For a more complete description of the options available in this dialog, see [Textbase Creation Dialog](#).



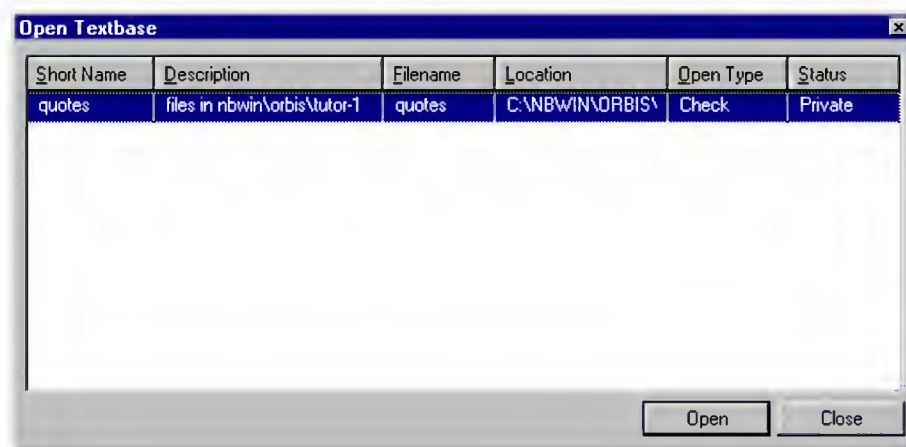
- 4 When you have completed the dialog, click **OK**. The Orbis: File Selection dialog will open.
- 5 In this case, we will be selecting all of the files in one folder, so we will select by file type and folder, not by individual files. Make sure that "Select by File Types (in Selected Folders)" is selected, then click **OK**. The Select Files for Textbase dialog will open.
- 6 In the Folder Panel on the left side of the dialog, find and click on the \Nbwin\Orbis\Tutor-1 folder. (If necessary, use the scroll bars to show folders above or below those displayed and/or click on the + boxes next to **Nbwin** and **Orbis** to show subfolders.) Once the Tutor-1 folder is highlighted, click the **Add Folder** button to select this folder for inclusion in the textbase. The next step is to select which types of files will be included in the textbase. You can use the File Types drop down list to select file types or type in your own file type. In this case, we will use the default setting, which selects all of the files in the specified folder with a .nb or a.txt extension. You will see that the File Types box has this selection. Click **Add File Type**. The dialog should now look like this:



- 7 If you have made mistakes, the **Delete Item(s)** button can be used to delete whatever is highlighted in the main window in the center of the dialog. If you see the folder and file types listed as they are above, then click **Index** to create the new textbase. Orbis will create an index that includes information about the location of all keywords in the documents (every word used in the specified files is a keyword, except for words on the omit list).
- 8 The Orbis indexer will appear, showing the progress of creating the index for the textbase. This is a small textbase, so indexing will be completed very quickly. Indexing a larger textbase may take several minutes. It is the initial creation of the index that makes it possible to conduct searches of the textbase almost instantaneously, even with a large textbase. When the indexing is complete, click **OK**.

Orbis Tutorial 4: Opening a textbase

Once you have created the textbase, you can open it. The easiest way to open a textbase is to select the textbase from the drop down list at the top left of the Orbis screen. You can also open a textbase by clicking **File, Open Textbase**, selecting the textbase to open and clicking **Open**. Notice the information that is provided in the Open Textbase dialog. Sometimes, there is not enough room in the dialog to display all of the information. For example, the Location is not fully visible in the screen below. You can view all of the information by using your mouse to drag the border between the headings. In this case, dragging the border between Location and Open Type to the right would allow you to see the full location of the textbase (Location refers to location of the index and management files, not the location of the files that will be searched).



If you had more than one textbase, all of the textbases would be shown in the above dialog and in the dropdown list at the top left of the Orbis screen.

Orbis Tutorial 5: The Query View and Results View Screens

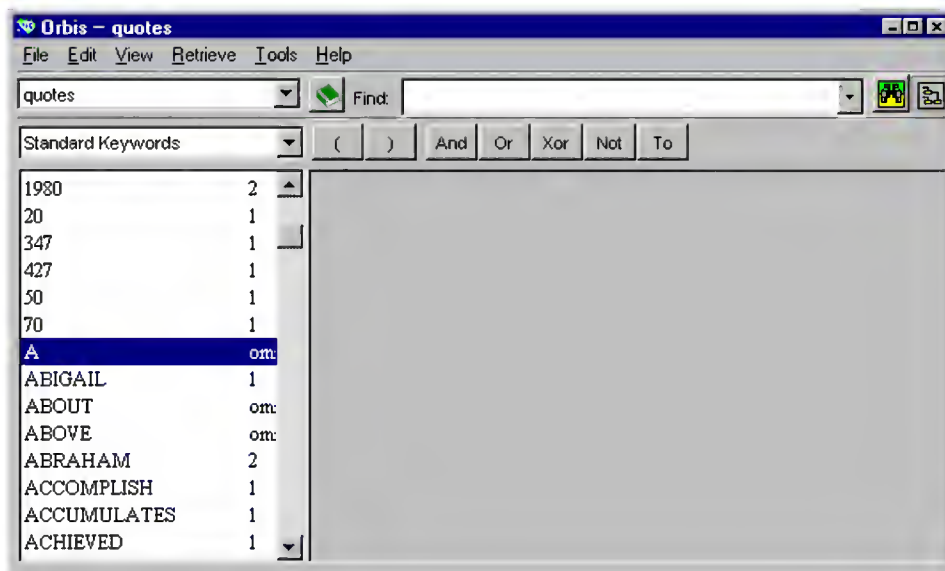
There are two basic views in the Orbis main window: Query View and Results View.

You can move back and forth between Query View and Results View in any of the following ways:

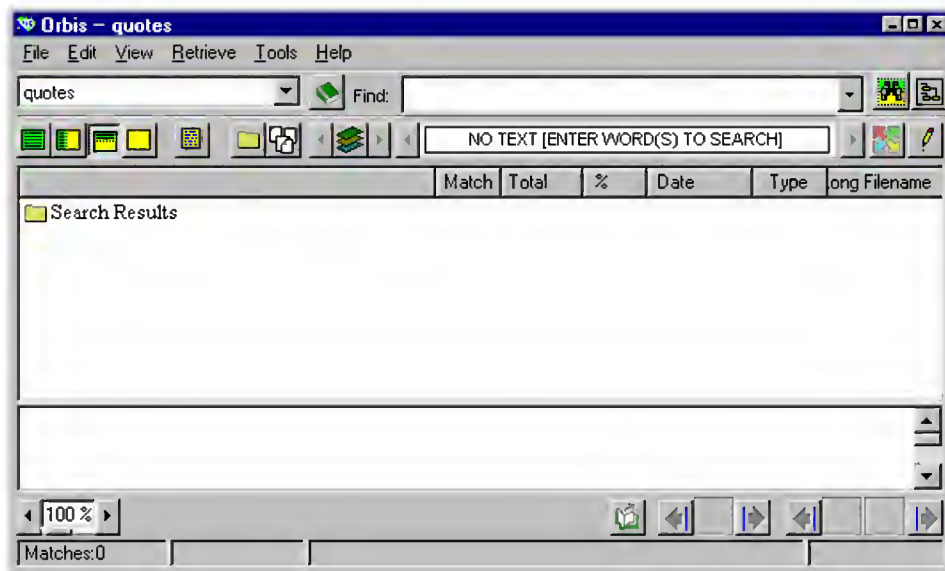
- ü Click the **Query View** button or the **Results View** button at the top right of the Orbis screen.
- ü Click **View, Query View** or click **View, Results View**.
- ü Press **Ctrl+Q** for Query View or **Ctrl+R** for Results View.

Try using these methods to move back and forth between the two main views as you review the information and terminology presented in the images below.

Query View allows you to enter search terms, and to see a list of the keywords (keywords include all of the words used in all of the files in the textbase, except those on a user-modifiable omit list). As we will see later, it also shows a diagram of the search terms entered and how many entries match the search terms. To display the Query View screen, click the **Query View** button at the top right of the screen, or click **View, Query View**, or press **Ctrl+Q**.



Results View lets you retrieve and view entries matching the search terms you have entered in the Find box, and write them to the document you have open in Nota Bene. To display the Results View screen, click the **Results View** button at the top right of the screen, or click **View, Results View**, or press **Ctrl+R**. No results are shown in the example below, but in subsequent exercises, we will conduct several searches and retrieve results.



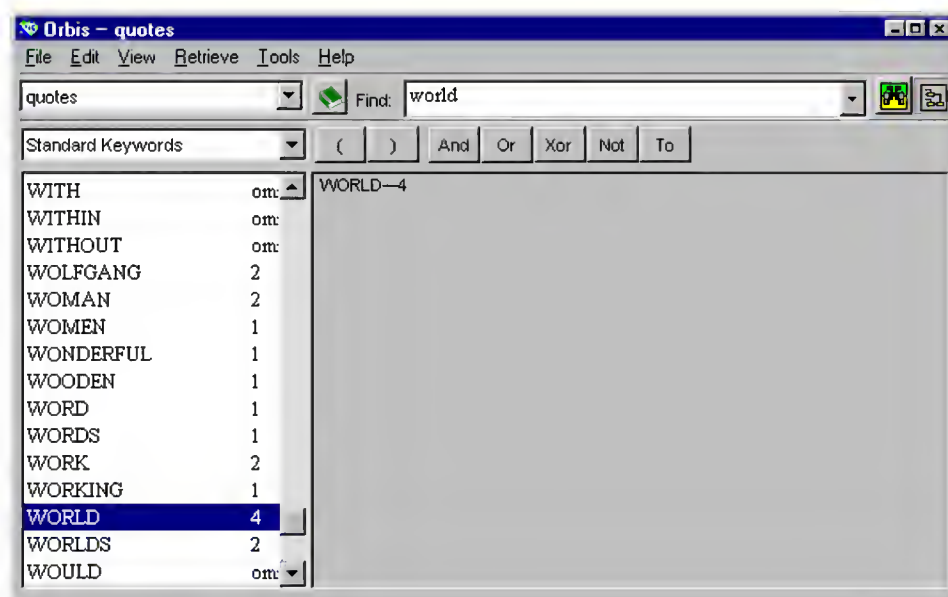
In the next exercise, we will do our first search.

Orbis Tutorial 6: A Simple Search of the Textbase

Open Orbis, open the Quotes textbase, and go to Query View. If necessary, return to Exercise 4 and Exercise 5 to review how to do these things.

The simplest kind of textbase search, and also the most common, is a search for entries in the textbase containing a single term. To search for all the occurrences of a single term, just type the term into the Find box.

In this exercise, we are going to retrieve all the entries in the Quotes textbase containing the word **world**. Type **world** in the Find box as shown below. Notice that as you type, Orbis displays the keyword vocabulary list, searches, and plots the number of hits in the textbase:



Orbis has found 4 entries matching the search criteria.

By default, Orbis ignores case distinctions, so you could type **world** or **World** or **WORLD**, and the results will be the same. (You can set up your textbase to take case distinctions into account if that is your preference.)

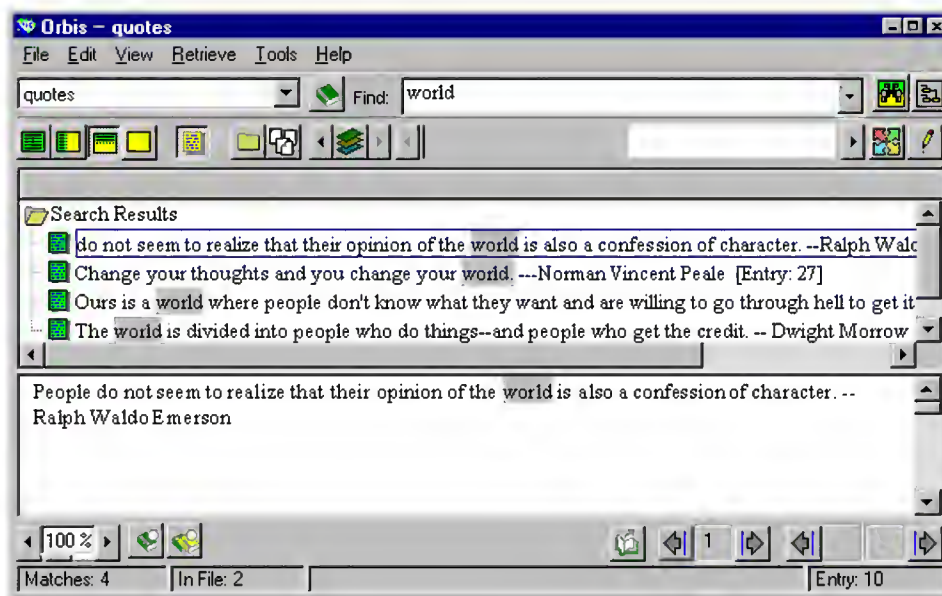
In later exercises, we will conduct more complex searches. For now, let's retrieve the entries containing the term **world**.

Orbis Tutorial 7: Retrieving and Viewing Search Results

To retrieve the entries containing the term "world," click **View, Results View** or click the Results View button or press **Ctrl+R**. If your screen does not match the screen below, click **View, Horizontal Split**, and then click **View, Entries Only**.

The search results are shown in summary format in the Search Results Panel (the top panel in the example below), and the full entry is shown in the Entry Display Panel (the bottom panel in the example below). To examine the contents of any of the entries, click to select the entry in the Search Results panel. The full paragraph will then be displayed in the Entry Display Panel.

In the example below, the entry that begins "do not seem" is selected, and the full paragraph is shown in the bottom panel.



Try clicking each of the other results in the Search Results Panel (the top panel).

The Results View screen of Orbis provides many options for viewing the results. Experiment with different views by using the View menu or by clicking the different Screen Display buttons.

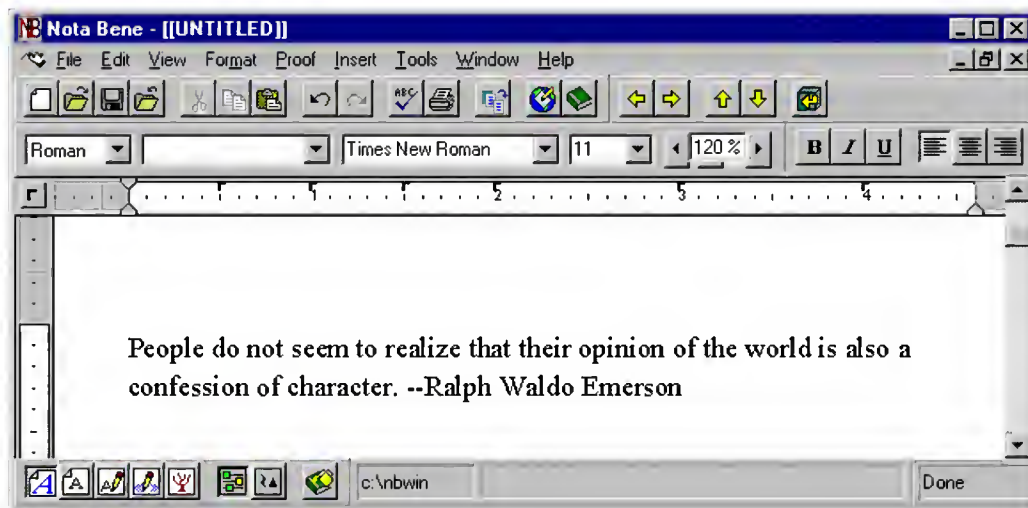
Sometimes it is helpful to see the context of the entry that is displayed. You can expand text displayed in the Entry Display Panel to include text that appears in the original file before and/or after the displayed entry. Place your cursor in the Entry Display Panel and press **Alt+PgUp** or **Alt+PgDn** (or click **View** and then **Text Before Entry** or **Text After Entry**).

Orbis Tutorial 8: Inserting Entries into an Nota Bene Document

In many cases, you will be searching the textbase to locate passages of text you want to incorporate into new documents you are writing. Copying an entry from your textbase and pasting into an open Nota Bene document is a simple matter of locating the entry, and clicking the Insert in Document button.

Let's go through these steps now with the entry we have displayed in the Results View panel:

- 1 Click the Insert in Document button (in the upper right hand corner of the Results View screen) to write this entry to the open Nota Bene document.
- 2 Click on the Nota Bene window. The text we have just retrieved in Orbis is placed in the open Nota Bene document.



You have just completed the basic steps you will follow to use Orbis in your work.

In preparation for the next exercise, click on the Orbis button on the Nota Bene screen to return to Orbis, and then click on the Query View button to return to the Query View screen.

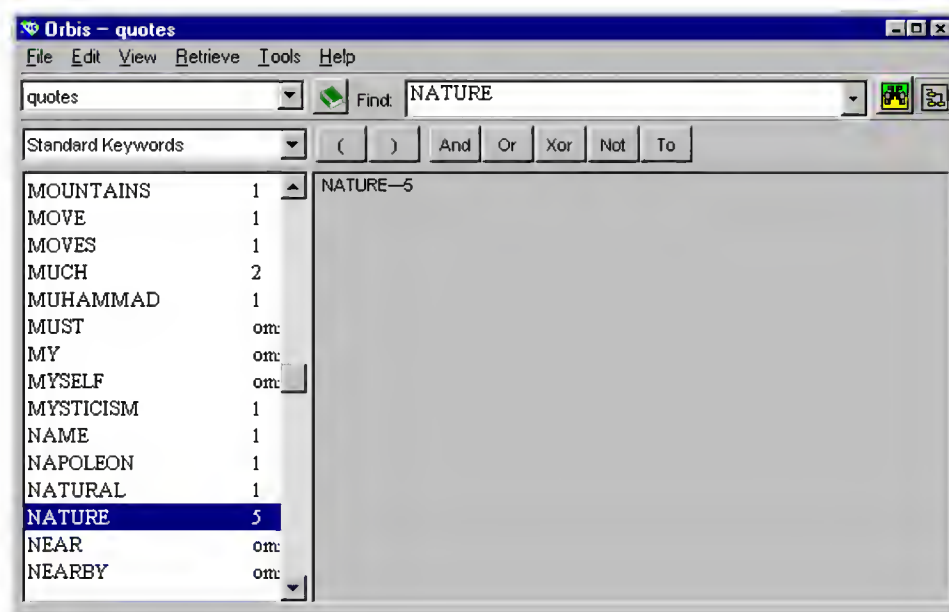
Orbis Tutorial 9: Using the Keyword Vocabulary List to Search the Textbase

Searches can be typed in, as we have just done in the search exercise. When you type in terms, however, it is always possible that the search term or terms are not in the textbase. An easier and more effective way of entering search terms is to use the Keyword list.

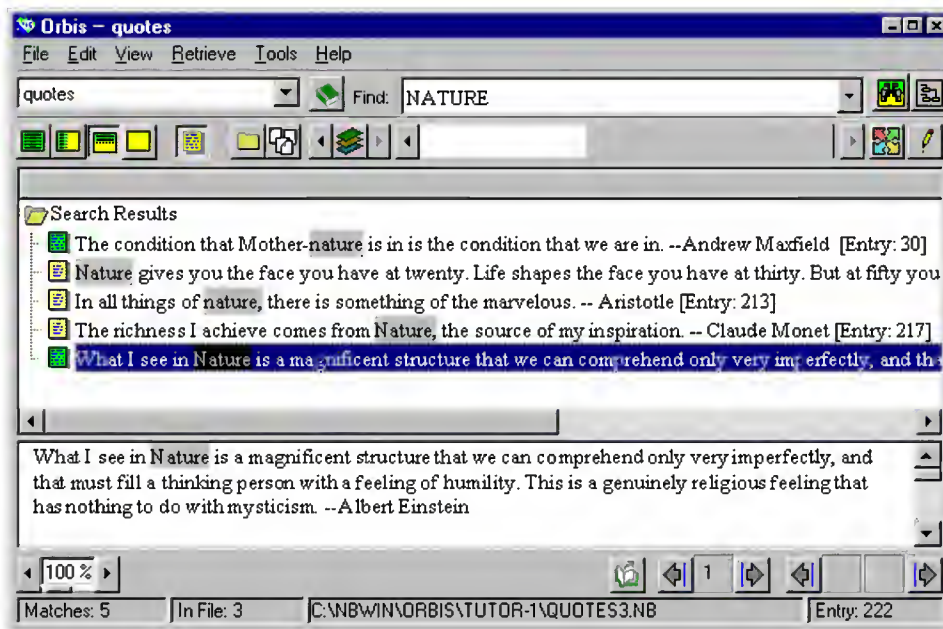
The Keyword list includes all the keywords that have been indexed in the current textbase. You can double-click on any term that appears in the keyword list to enter in the Find box.

To use the Keyword List panel to find all entries containing the term **nature**:

- 1 Type **n** in the Find box now to go to the entries starting with **n** in the list. Orbis will display the first term in the Keyword vocabulary list beginning with **n**.
- 2 Find the word **nature** in the list (use the scroll arrows if necessary), and double-click on it. Orbis will insert the word **nature** in the Find box.



- 3 Click on the **Results View** button to see the entries containing the word **nature**:



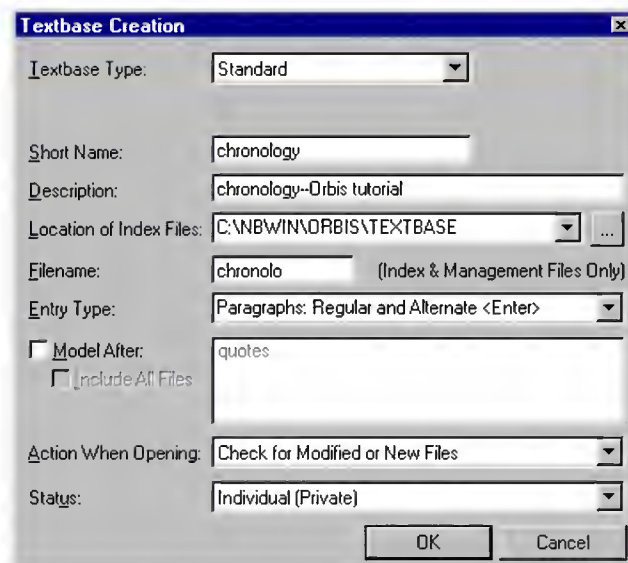
You can also initiate an Orbis search directly from your open NB document. To see how this works, close Orbis. On your Nota Bene screen, type the word "nature" or "life" (or any word that is used in this textbase). With your cursor on the target word, press **Ctrl+Shift+F**. This key combination will open Orbis, open the most recently used textbase (in this case, the Quotes textbase), and search the textbase for the word you selected.

Orbis Tutorial 10: Review of Textbase Creation

In this exercise, we will create a second textbase that will be used in subsequent exercises. This textbase will have the following characteristics:

- Ü Name of the textbase: Chronology
- Ü Entry type: Paragraphs: Regular and Alternate <Enter>
- Ü Files to be searched: All of the *.nb files in the C:\Nbwin\Orbis\Tutor-2 folder (if your hard drive uses a letter other than C, substitute that letter).

At this point, you should be able to create this textbase yourself. Refer to Exercise 3, Tutorial 2, Create Textbase (if necessary), to the information above, and to the screen shot below and create the new Chronology textbase.



Note that the Filename is limited to 8 characters. In this case, a Short Name that is longer than 8 letters is used, so the Filename was automatically shortened to 8 letters. You cannot enter more than 8 letters in the Filename field. The Filename is used by the program to create the index and management files that make searching possible. The Short Name is used to identify the textbase in the drop down list that is used to select a textbase. A longer description of the textbase is optional and can be entered in the Description field. This can be used to remind you about the nature of the textbase and/or the files it contains. The Description will appear in the Open Textbase dialog and the Maintain Textbase dialog and may help you select the textbase you want.

In this case, all of the files in the Tutor-2 folder have the .nb extension. In setting up the textbase, you could choose to use only *.nb as a file type, or you could use the default file type of *.nb and *.txt. It is best not to use *.* (all files in the folder) because Nota Bene automatically makes and saves backup files with the extension .bak. If the .bak files are included in your textbase, you will have duplicate results (one in the .nb file, and one in the .bak file). However, you can use *.* as a file type, and then exclude .bak files.

You may want to review what you learned in previous exercises by opening the Chronology textbase, conducting a simple search and inserting one of the retrieved passages in an open Nota Bene document.

If you have questions about textbase creation, more information is available on the following page (and pages linked from this page): [Create New Textbase](#) Click the **Back** button at the top of the Help screen to return to this page.

The next few exercises in this tutorial will demonstrate a few more complex searches.

Orbis Tutorial 11: Searching with Search Strings

For this exercise, we are going to search the **Chronology** textbase using more complex search strings.

A search string can consist of a single word or it can consist of various combinations of words, wildcard characters, search operators and/or parentheses.

Take a moment to click each of the green links above and after reviewing each of these pages, click the **Back** button at the top of the help screen to return to this page.

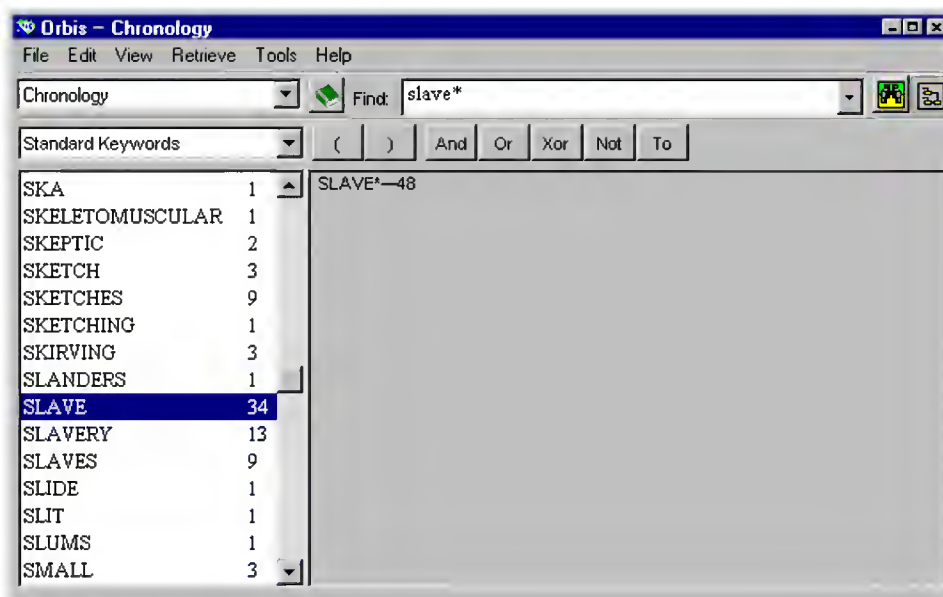
The best way to familiarize yourself with the way search strings work in Orbis, however, is to try a few searches using them yourself. In the next four exercises (11a, 11b, 11c and 11d) we will search the Chronology textbase using the wildcard (*), OR, AND, and parentheses.

Open the **Chronology** textbase and click the **Query View** button now.

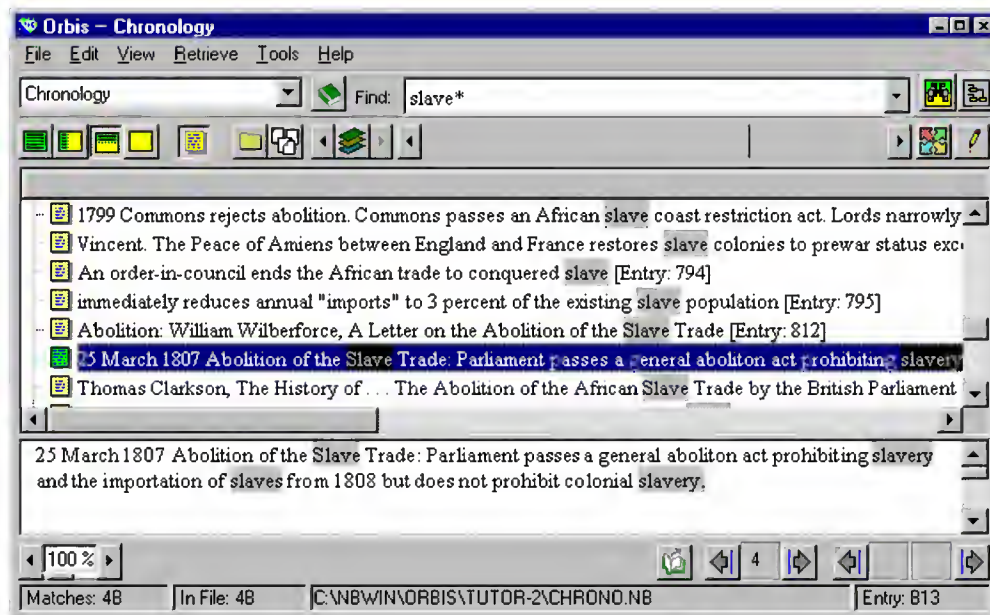
Orbis Tutorial 11a Search Strings: *(wildcard)

If you type the word **slave** in the Find box, and look at the keyword list, you will see that there are three words that begin with "slave."

Type the following search string in the Find box: **slave***, as illustrated below. Notice that Orbis has now found 48 entries. Looking at the keyword list, you can see that "slave" occurs in 34 paragraphs, "slavery" in 13 paragraphs and "slaves" in 9 for a total of 56. The fact that "slave*" occurs in only 48 paragraphs, indicates that there are some paragraph where more than one of the 3 words are used.



Now click the **Results View** button to view the matching 48 entries. Scroll down to see all of the entries, and click on any entry in the top panel to see the full entry in the bottom panel.

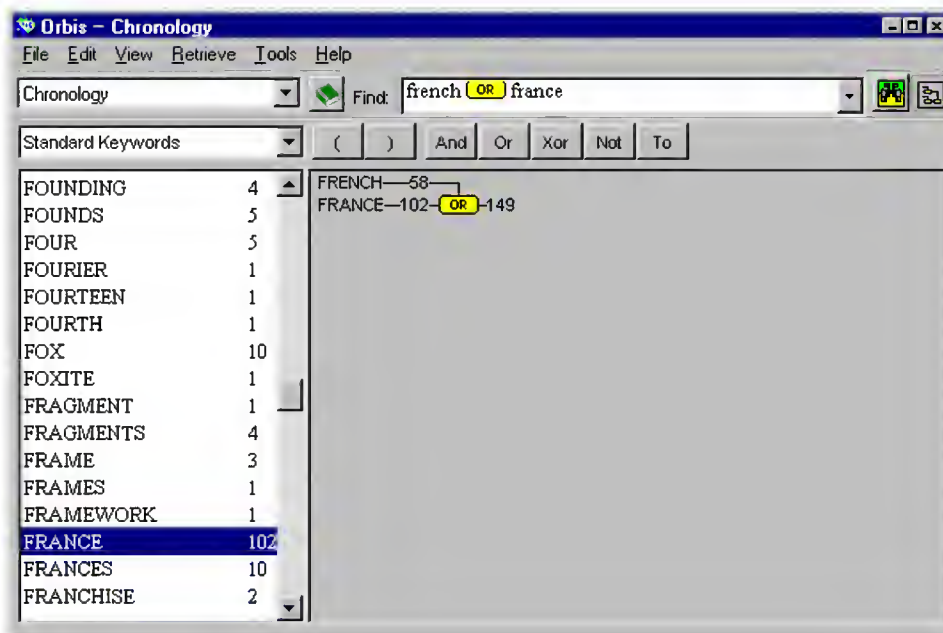


Before we move on to the next exercise, you might want to note that you can see how the display changes when you click the Show/Hide Files button or the Show/Hide Folders button. When folders and/or files are displayed, the display in the Search Results Panel (the top panel) can be expanded or contracted by clicking on the small boxes that contain a plus sign or a minus sign.

Orbis Tutorial 11b Search Strings: OR

Sometimes it is helpful to search for entries that contain either of two related words. For example, if you are searching for entries that contain the word "France," you would probably also be interested in entries that contain the word "French."

Click **View, Query View** to return to the **Query View** screen. Type **french** in the Find box, click the **OR** button, and then type **france**. You could also merely type **french or france** instead of using the **OR** button. If you type the word "or" instead of clicking the **OR** button, the word "or" will appear in the same font as the other words, not in the yellow operator box. However, "or" is on the omit list, so you cannot search for it. The program will recognize it as an operator, and the results will be the same as those shown below. Normally, case distinctions are ignored, so you can type in either upper or lower case letters and the result will be the same.



Notice that Orbis has now located 149 entries in the Chronology textbase.

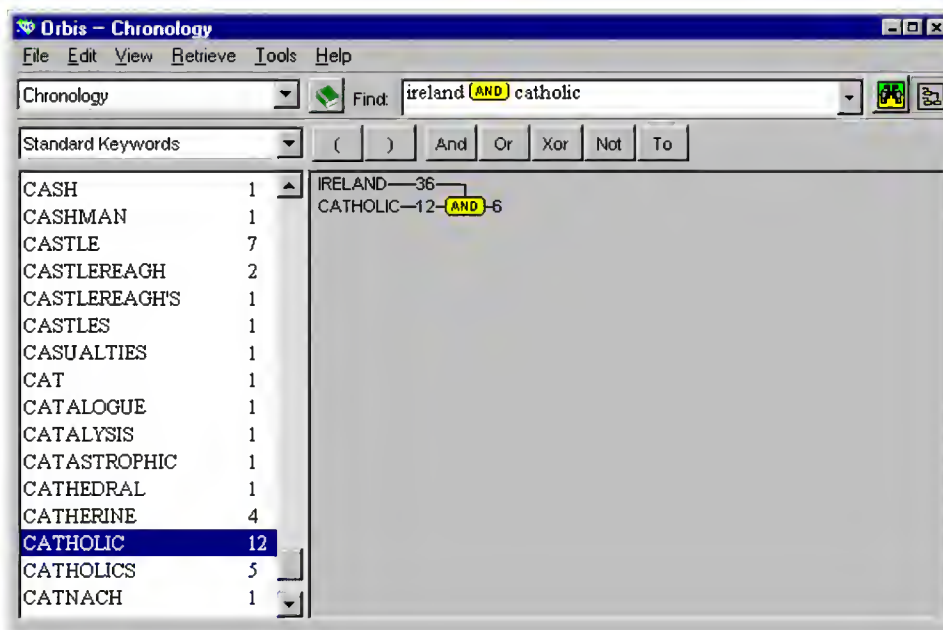
As you can see, there are 58 entries that contain **french** and 102 that contain **france**. The total of 149 is the number of entries that contain either **french** or **france** or both.

Next, we are going to use the **AND** operator in a search string.

Orbis Tutorial 11c Search Strings: AND

We can find entries that contain both a first term and a second term by using the **AND** operator.

Suppose that you are writing about Catholics in Ireland and want to see if the textbase contains any information on this topic. We can find relevant entries in the Chronology textbase by entering the search string shown in the Find box below. Enter this search string now.



Note that the Search Results Plot panel indicates that there are 36 entries containing the keyword **ireland**, and 12 that contain **catholic**, but only 6 that contain both terms.

Click the **Results View** button now to view the six entries, and then click on the **Query View** button again.

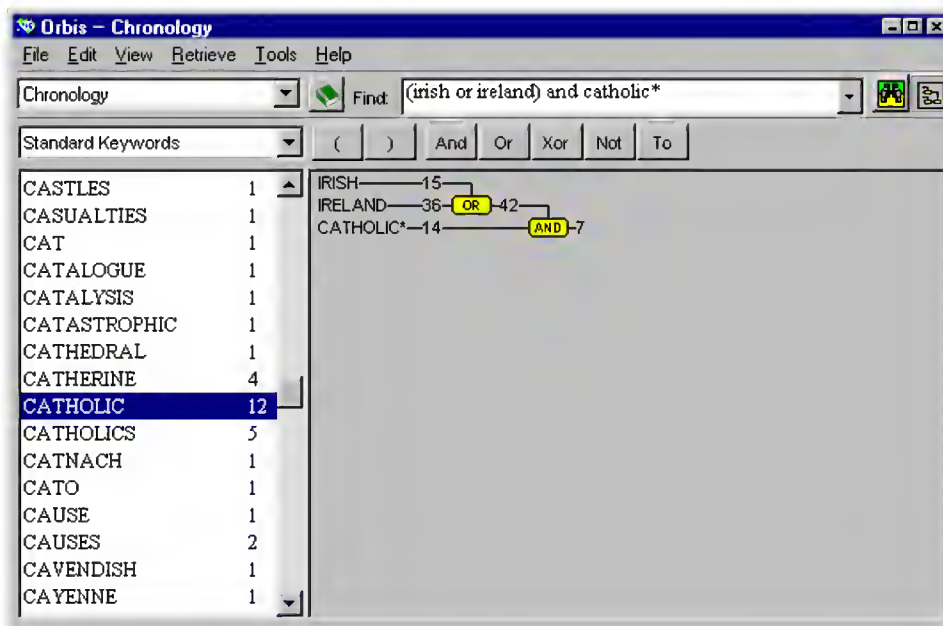
In a search string, the **AND** operator is assumed if more than one word is used. Thus, the search string **ireland catholic** would have exactly the same result as the above search. The search string **ireland and catholic** (typing in the word "and") would also have exactly the same result. The word "and" is on the omit list, so the program does not search for it, but the program does recognize it as a search operator.

There may be other relevant entries in the textbase that we are missing. In the next exercise, we will expand the search by using parentheses, the **AND** operator, the **OR** operator, and the wildcard character.

Orbis Tutorial 11d Search Strings: Parentheses

We can expand our search for entries dealing with Catholics in Ireland by using parentheses to look for entries that contain either **irish** or **ireland**. We can also use **catholic*** instead of **catholic** so that entries containing "Catholics" as well as those containing "Catholic" are retrieved. We simply enclose the OR search in parenthesis, so that the entries that contain either **irish** or **ireland** are retrieved, and then this group is searched for those that also contain **catholic***.

In the example below, we just typed in the words "or" and "and" rather than entering them by clicking the operator buttons. For this reason they do not display in yellow in the Find box. But the result is the same. These operators can be entered either way.



As you can see, 7 entries have now been found. Click the Results View button to examine the results of this search.

Orbis Tutorial 12: Adding Keywords to a Document

By default, Orbis treats every word as a keyword, except words on a user-modifiable omit list. This means that you do not have to decide in advance which words will be searchable and you do not need to take any extra steps to define keywords. Most Orbis users never add keywords to their documents, and find that searching without taking this extra step meets their needs.

In some cases, however, it may be helpful to add non-printing keywords to your document. For example, in exercise 9, we searched the Quotes textbase for the word "nature" and found 5 paragraphs that contained that word. However, we missed the following entries that are about nature, but do not contain the word "nature."

To me a lush carpet of pine needles or spongy grass is more welcome than the most luxurious Persian rug. -- Helen Keller

I went to the woods because I wished to live deliberately, to front only the essential facts of life, and see if I could not learn what it had to teach, and not, when I came to die, discover that I had not lived. -- Henry David Thoreau

If you want to make sure that a search for "nature" will pick up these terms, you can add "nature" as a non-printing keyword in the document. The above entries are the second and fifth paragraphs in Quotes3.nb which is in your \Nbwin\Orbis\Tutor-1 folder. Open this file now and take the following steps add "nature" to these paragraphs as a non-printing annotation or keyword.

- 1 With the cursor at the beginning of the Helen Keller quote, click **Insert, Orbis Keywords**. Nota Bene will display the Annotations dialog. Enter **nature** the Active Annotation box as illustrated here:



- 2 Click **Insert** to insert the word "nature" as a non-printing annotation. The Annotations dialog will remain open with "nature" as the active annotation.
- 3 Move your cursor to the beginning of the Thoreau quote and click **Insert** again. Then click **Close** to close the Annotation dialog.

You should now see annotation markers at the beginning of the second and fifth paragraph (if you don't see the markers, click **View, Show/Hide Markers, Annotations** to turn on the Annotation markers). The content of these markers can be seen in any of the following ways:

- ü Open the Annotations dialog (click **Insert, Orbis Keywords**) and click **Next** (or **Previous**) to display the next keyword in the file (or the previous keyword).
- ü Place your cursor just after the annotation marker and press **F3**. The Annotations dialog will open and can be used as described above.
- ü Switch to Codes View (**View, Codes** or **Shift+F8**) and you will see the following code: `<nt/8nature>`
- ü In Page Layout view (the default view), place your cursor on the annotation marker (you may need to use the left arrow on your keyboard to position the cursor properly) and you will see an InfoTip box with the content of the annotation (if you don't see this, click **Help, InfoTips** and make sure that the Annotations tips have not been turned off). You will also see the content of the annotation on the Status Line at the bottom of the Nota Bene screen.

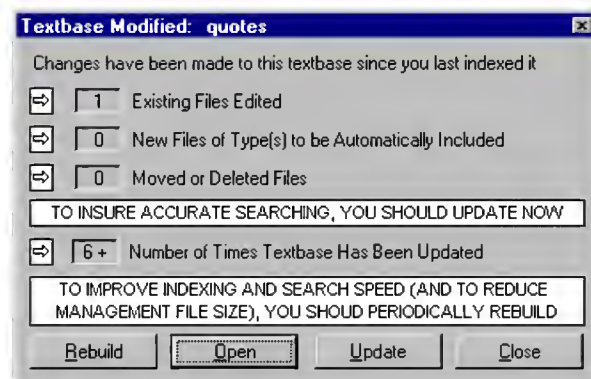
Take a look at your annotations in each of these ways and then save and close Quotes3.nb.

Now that you have inserted these two non-printing annotations (or keywords), you will need to rebuild your index. We will do that in the next exercise.

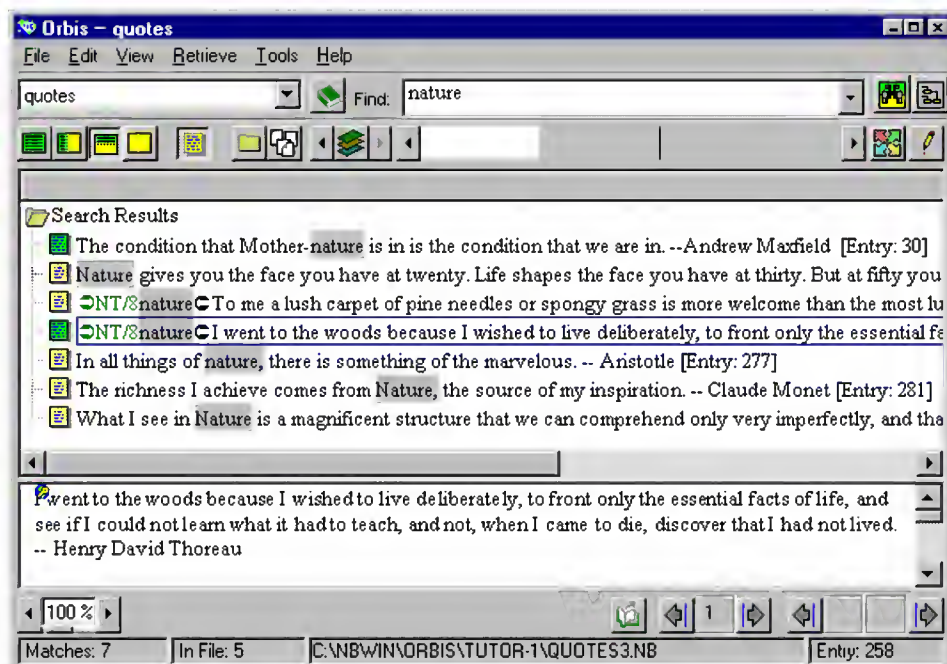
Orbis Tutorial 13: Reindexing

After you have edited any of the files in your textbase, you will need to update the textbase so that the change will be included. We have just edited Quotes3.nb, so we need to update the **Quotes** textbase.

If your textbase is not open, you will automatically be prompted to update when you open the textbase. If your textbase is open, click **File, Update Textbase**. Orbis will display the Textbase Modified dialog as shown below. Click **Update** to update the Quotes textbase. The Orbis Indexer will display and show the progress in reindexing, which will be almost instantaneous in this case. Click **OK** to close the Indexer.



Now open the Quotes textbase and search for all entries containing the term nature. As you will see, there are now seven entries that are retrieved, including the two with the non-printing keyword that we added in exercise 12:



Orbis Tutorial 14: Creating Your Own Textbases

Now that you have finished the Orbis tutorial, you are well prepared for creating your own textbases.

More information about Orbis is included in the sample file Academe2.smp. This is a Nota Bene file that can be opened from your Nbwin\Document\Samples folder. There are also several short videos that describe the use of Orbis. The videos can be accessed from the main Nota Bene screen by clicking Help, Instructional Videos.

There are a few suggestions we would like to make at this point, which might help you as you are working with actual files.

- ü Think about the purpose of your textbase before you begin. What will you be searching for and what files will you want to have included? You may want to have different textbases for different purposes, e.g., one for searching all of your research files, one for searching research files from a particular source, one for personal files and correspondence, etc. You can have as many textbases as you want, and the same files can be indexed in more than one textbase.
- ü Is there a finite number of files that you want to index or will you want to add files to a growing textbase as you go? If you want to easily and automatically add files as you go, you should use File Types Mode to create your database. If there is a finite number of files you want to search (e.g., all of the chapters of your book), you can select files individually for inclusion.
- ü Decide on which folder or folders contain the files that you want to include and what file type you will use (if any). For each of these folders, you must make sure that either (a) there are no files in the folder that you do not wish to include in your textbase or (b) you can specify one or more file types (e.g., *.nb) to distinguish the files that you wish to include in the textbase from the files that you do not wish to include. You may want to move files into one or more folders before you begin.
- ü Generally, it is better to use specific file types like *.nb, rather than the more general *.* file type. This is because Nota Bene automatically creates backup files with the extension .bak and saves them in the same folder as the primary file. If you use the *.* file type, you should exclude the .bak files. Otherwise, Orbis will find results in the .bak files that will be duplicates of the results in the primary files.
- ü The paragraph entry type works well for most textbases. **Paragraphs: Regular or Alternate <Enter>** is the default setting, and this setting is recommended for most textbases. If your paragraphs are always separated by two hard returns, you may want to choose **Paragraphs: Double <Enter>**.
- ü If you are planning to take reading notes that will be part of an Orbis textbase, you can use Ibidem to create a file for each book, article or other work on which you will be taking notes. These note-taking files can be dynamically linked to Ibidem and then can be automatically included in special Orbis textbase. To create a note-taking file that is linked to a record in your Ibidem database, go to Ibidem, find the record for the book or article (or create a new one), and click the multi-colored Record Link button.
- ü In taking notes that you plan to search with Orbis, think about your use of bullets, and new lines. It may be best to keep related information in one paragraph rather than using a lot of new lines or bullets.

- ü If you find that the files you are working with require custom entry markers (e-mail files, for instance, may require this, as well as documents containing lecture notes or discussion questions), edit a single file, first, to make certain you are entering the markers correctly.
- ü After you have gained some experience in using Orbis, you may find a need for more control over your searches. If so, the following tools are available:
 - ü Use synonyms to expand your search. For example, a synonym list for "+nature" might include woods, forest, stream, lake, mountain, etc. Then a search for "+nature" would find all of the entries that include either nature or one of the words that you have defined as a synonym. For more information, see Synonyms.
 - ü Use special keywords (# or @ keywords) to restrict your search. For example, you might want to add the special keyword "#nature" to paragraphs in your notes that contain important insights about nature. Then a search for "#nature" would find only the specially marked paragraphs and not every place where the word "nature" is used. For more information, see Special Keywords.
- ü For an individual user, there is no practical limit the size of your textbase. Orbis can index up to 8,000 files in each of 1,000 folders (a total of 8 million files). You will be notified if there are more than 8,000 files in one folder.